

Background Check System User Guide: Entity Administrator Functions

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About This Manual

Welcome to the Background Check System (BCS) User Manual. This manual is intended to serve as a guide as you perform Oversight functions in BCS.

Please note that the BCS system (and therefore this manual) is subject to alteration. Modifications/updates to the manual may result from changes in State or Federal policies and procedures, BCS system upgrades, or other factors.

BCS was developed for use by the DSHS Background Check Central Unit (BCCU). Use of BCS and this manual is restricted to authorized end users of BCS system. BCCU can be contacted at **BCCUInquiry@dshs.wa.gov**.

Overview

Users of the Background Check System (BCS) are invited to register in BCS. An administrative user (BCCU Manager, Oversight Program Administrator, or Account Administrator) may add or update user profiles and send registration invitations to users.

All entities must have a Primary Account Administrator identified before they can submit background checks to BCCU. The **Primary Account Administrator** is responsible for adding other users to the entity account in BCS. This person may add additional Account Administrators who also may add new users to the account. The Primary Account Administrator is the main contact for the entity for BCS or BCCU notifications.

Entity Accounts can only be added by BCCU Managers or through the Nightly Upload. Entity Users will be registered and activated by following a link generated and sent by BCS. New Primary Account Administrators for entities may have to enter registration keys or temporary passwords, depending on their User Type (Internal (AD)/External (SAW)). The user registration key is time sensitive. The key is available for 7 days. This timeframe may be different for Go-Live than for the regular operation.

User Types and Statuses

A User Type is the way the user accesses BCS. BCS includes two user types: Internal and External.

Internal Users access BCS through the state's Active Directory (AD). State Employees are Internal Users.

External Users access BCS through SecureAccess Washington (SAW). Any BCS user who is not in the Active Directory (has an email address that ends in 'wa.gov') and access BCS through the State Government Network is an External User and will first log into SAW before getting to BCS.

BCS Users have two types of statuses in the system. A user's Profile Status may be Enabled, Disabled, or Pending. A user's Role Status may be Active or Inactive.

Enabled users may access BCS with any *Active* role.

Disabled users may not access BCS regardless of their role status.

Pending Users may only access the BCS Registration page to *enable* their profile and *activate* their roles.

User Groups and Roles

User roles in BCS are based on hierarchical access, the top role has access to everything within a functional area and the access is reduced in other roles based on the users need. Any role may be combined with another role in BCS. When multiple roles or user groups are assigned BCS will provide a person the ability to access all the functions within the both roles. For example, a user may have an Oversight user group role and an Entity User Group role. The person will be able to access all the Oversight pages and the Entity Pages within BCS.

An Entity Account Administrator may perform actions in BCS to manage the user's BCCU Account. Account administration includes:

- Managing Secondary Entities
 - Purpose of Secondary Entity
 - How to Create a Secondary Entity
 - How to Update a Secondary Entity
- Managing Users
 - Entity Account User Roles Overview
 - How to Add a New User
 - How to Update a User
 - How to Change the Primary Account Administrator

Managing Secondary Entities

Purpose of Secondary Entities

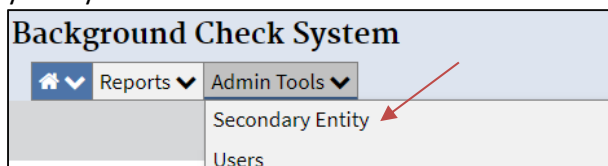
BCS includes functionality to add a Secondary Entity for Entity Accounts. Secondary Entities are used by some entities to track background check activities for sub-contractors or otherwise categorize the background checks within their account. Secondary Entities are only visible and used by the Entity Account users. BCCU and Oversight Programs may not view Secondary Entity information in BCS.

In BCS Secondary Entities are managed from the Admin Tools menu. The Secondary Entity page shows a list of all Secondary Entities added by the Entity Account Administrators. Checkboxes display for filtering the list.

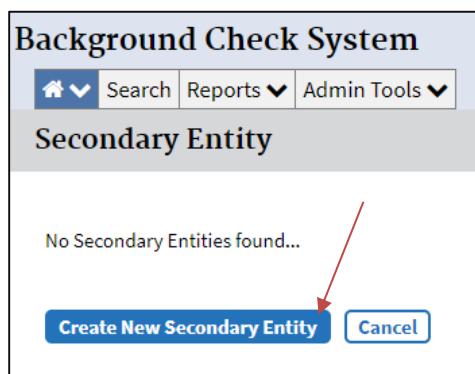
How to Add a New Secondary Entity

To Add a New Secondary Entity:

1. Select Admin menu
2. Select Secondary Entity



3. Click Create New Secondary Entity button



Background Check System

Home Search Reports Admin Tools

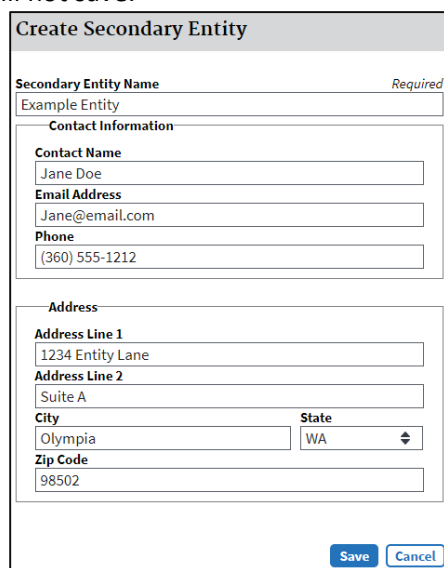
Secondary Entity

No Secondary Entities found...

Create New Secondary Entity Cancel

4. Add Contact information

- a. Note: Only Secondary Entity Name is required. If you begin to add a contact person or address information, the information must be complete to save. Partial contact information will not save.



Create Secondary Entity

Secondary Entity Name *Required*
Example Entity

Contact Information

Contact Name
Jane Doe

Email Address
Jane@email.com

Phone
(360) 555-1212

Address

Address Line 1
1234 Entity Lane

Address Line 2
Suite A

City
Olympia

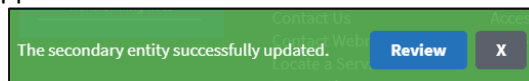
State
WA

Zip Code
98502

Save Cancel

5. Click Save

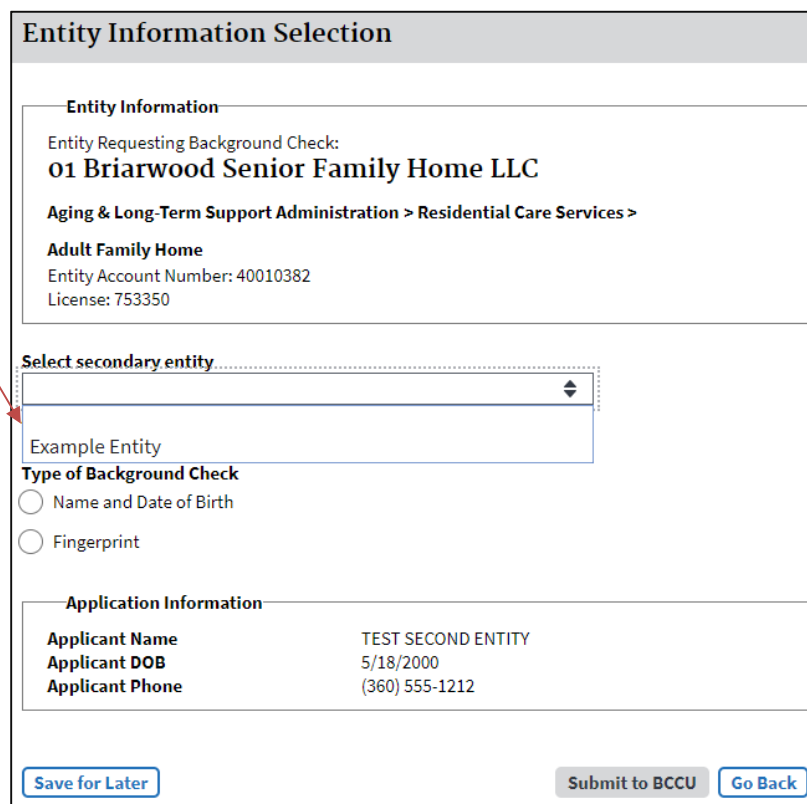
- a. Message appears. Click the X to close.



The secondary entity successfully updated. Review X

6. Log out of BCS and then Log back in

7. Follow the procedures to 'Enter a background check'; on the Select Entity Information Page, notice the new Secondary Entity is available in the Secondary Entity list.



Entity Information Selection

Entity Information

Entity Requesting Background Check:
01 Briarwood Senior Family Home LLC

Aging & Long-Term Support Administration > Residential Care Services >

Adult Family Home
 Entity Account Number: 40010382
 License: 753350

Select secondary entity.....

Example Entity

Type of Background Check

☐ Name and Date of Birth

☐ Fingerprint

Application Information

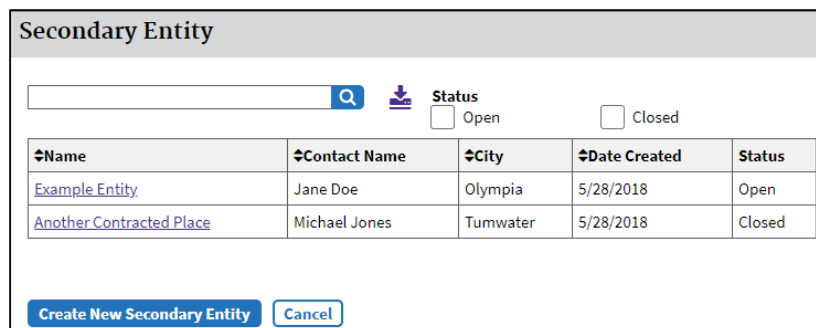
Applicant Name TEST SECOND ENTITY
Applicant DOB 5/18/2000
Applicant Phone (360) 555-1212

[Save for Later](#) [Submit to BCCU](#) [Go Back](#)



How to Update a Secondary Entity

To update a Secondary Entity:

1. Select Admin menu
2. Select Secondary Entity
3. Click the Name of the Secondary Entity you wish to update from the list
 - a. If the list contains more than one Secondary Entity, type keyword information in the search field and click the search icon to reduce the list.



Secondary Entity

Search:   Status: ☐ Open ☐ Closed

↕Name	↕Contact Name	↕City	↕Date Created	Status
Example Entity	Jane Doe	Olympia	5/28/2018	Open
Another Contracted Place	Michael Jones	Tumwater	5/28/2018	Closed

[Create New Secondary Entity](#) [Cancel](#)

4. Update information for the Secondary Entity
 - a. **Note: Only Secondary Entity Name is required. If you begin to add a contact person or address information, the information must be complete to save. Partial contact information will not save.**
5. Click Save
6. Log out of BCS and then Log back in
7. Follow the procedures to Enter a background check; on the Select Entity Information Page, notice the new Secondary Entity is available in the Secondary Entity list.

Search and Close Secondary Entity

To Search the Secondary Entity List:

1. Select Admin Tools
 - a. Admin Tools menu shows
2. Under Admin Tools, Select Secondary Entity
 - a. Secondary Entity List is displayed
3. Unclick the Closed Button
 - a. The list of open secondary entities is displayed.

To Close a Secondary Entity:

1. Click on the secondary entity Name
 - a. The details of the secondary entry are displayed
2. Select Close
 - a. Returns to BCS Secondary Entity page
3. Uncheck the Open box
 - a. Shows closed Secondary Entity
4. Select the closed entity
 - a. The closed secondary entity opens
5. Select the Reopen button
 - a. **NOTE: This is a known Error. The Reopen button is disabled and cannot be selected. Instead return to the Secondary Entity page and add a new 'Open' Secondary Entity, Save, and return the Secondary Entity page. Returns to BCS Secondary entry screen with only Closed option selected, and the reopened entity does not show in the list**
6. Unclick the Closed Button
 - a. The list of open secondary entities is displayed.
7. Select Cancel
 - a. Entity Home page is displayed.

Managing Users

There are three types of Entity Account Users: Entity Account Administrator, Entity Account User, and Entity Account Submitter.

Entity Account Administrators may manage any user assigned to their entity and also manage Secondary Entities. For each entity, a single user must be assigned as the Primary Account Administrator (PAA). This person is responsible for the people who have access to BCS for that account. The PAA may add other Entity Account Administrators to manage the administrative functions of BCS for the entity account.

The Entity Account Administrator may enter and submit background checks and retrieve background check results in addition to performing administrative functions in BCS.

Entity Account Users may enter and submit background checks and retrieve background check results.

Entity Account Submitters may enter background checks and submit to BCCU. They may not view the results of background checks.

How to Add a New User

To add a new User:

1. Click Admin Tools menu
2. Click Users
 - a. Users page displays

1 Rose Hill Place LLC

☐ Disabled
 ☐ Enabled
 ☐ Pending

↕User Name	↕First Name	↕Last Name	↕Role	↕Auth Type	↕Created Date	↕Last Login	Status	Primary
dshs\elderem	Beth	Elder	Account Administrator	Internal User	5/28/2018	5/25/2018	Enabled	<input checked="" type="radio"/>
dshs\collej	Jennifer	Colley	Account Administrator	Internal User	5/28/2018	5/25/2018	Enabled	<input type="radio"/>

3. Click Add User
 - a. User Profile page displays

User Profile

Contact Information

Username (Email) *Required*

4. Add new user email address and click Find, then add User Account Info and save.

User Profile

User Account Information

Username (Email) *Required*

First Name *Required*

Middle Name

Last Name *Required*

Job Title

Phone

Fax

- a. Note: Washington State Employee users will populate with data from Active Directory If user email is found, then user profile displays, otherwise User Account is saved

- i. **Note: At go Live, only non-State Employee users or SecureAccess Washington (SAW) users may be added**

5. Click Add New under Entity Roles

Entity Roles (0 Active)

No Entity Roles found...

[Add New](#)

- a. Fields display auto populated with Administration, Division, Inquiry Type, and Entity.

Entity Roles (0 Active)

No Entity Roles found...

[Add New](#)

Select administration *Required*
Aging & Long-Term Support Administration

Select division *Required*
Residential Care Services

Select inquiry type *Required*
Adult Family Home

Select entity *Required*
40010260: 1 Rose Hill Place LLC, Adult Family Home, Kirkland

Role *Required*
Account Administrator

[Save](#) [Cancel](#)

6. Select Role

7. Click Save

- a. New account displays in a table with Account #, Entity Name, City, Role based on selections.

Entity Roles (0 Active; 1 Inactive)

[Search](#) [Download](#) ☐ Hide Inactive

Account #	Entity Name	City	Role	Status
40010260	1 Rose Hill Place LLC	Kirkland	Account Administrator	Inactive

[Add New](#) [Generate Registration Letter](#)

- b. Status is Inactive for SAW users or Active for AD users
c. Registration Letter is sent automatically

8. Click Add New to add another user.

9. Click Go Back Button twice

- a. User page displays and is reset.

How to Update a User

To update user Contact Information:

1. Click Admin Tools menu
2. Click Users
 - a. Users page displays

3. Click the Username of the user you wish to edit
 - a. User's Profile displays
4. Update the User's Name or contact information
5. Click Save
 - a. Message: Successfully saved...

To update a user's role:

1. Open the user's profile
2. Find the role you wish to update
3. Click the link for Active or Inactive
 - a. Message: Are you sure you want to change this user's status...?
 - b. Click Cancel Message disappears and user's role doesn't change
 - c. Click "OK" User's status is changed to Inactive.

Generate a New Registration Letter for a User

1. Click Admin Tools menu
2. Click Users
 - a. Users page displays
3. Click Username
 - a. User Profile displays
4. Click Generate Registration Letter button.

User Account Information

Username: dshs\elderem
Email: elderem@dshs.wa.gov

User Profile Status: Enabled

First Name: Beth (Required)

Middle Name:

Last Name: Elder (Required)

Job Title:

Phone: (999) 999-9999 or (999) 999-9999 x9999

Fax: (999) 999-9999 or (999) 999-9999 x9999

[Generate Registration Letter](#) [Save](#)

First Login: 5/23/2018
Last Login: 5/26/2018

Entity Roles (2 Active)

[Q](#) [Download](#) ☐ Hide Inactive

Account #	Entity Name	City	Role	Status
40010260	1 Rose Hill Place LLC	Kirkland	Account Administrator	Active
10000001	State Employee Account	alallsa	Account Administrator	Active

[Add New](#) [Generate Registration Letter](#)

- a. Button appears for each role. A Sticky Toast message appears stating that registration letter has been sent. Click the X to close the message
5. Click Go Back Button

- a. User page displays and is reset.

How to Change the Primary Account Administrator

Each entity must have an Enabled and Active Account Administrator who is set to 'Primary'. If there is no Active Primary Account Administrator, then no other users may be added for the entity.

1. Click Admin Tools menu
2. Click Users
 - a. User page displays listing all users for the entity with Primary indicated

1 Rose Hill Place LLC

☐ Disabled
 ☐ Enabled
 ☐ Pending

↕User Name	↕First Name	↕Last Name	↕Role	↕Auth Type	↕Created Date	↕Last Login	Status	Primary
dshs\elderem	Beth	Elder	Account Administrator	Internal User	5/28/2018	5/25/2018	Enabled	<input checked="" type="radio"/>
dshs\collej	Jennifer	Colley	Account Administrator	Internal User	5/28/2018	5/25/2018	Enabled	<input type="radio"/>

3. Click the radio button in the Primary column for another Entity Administrator
 - a. The selected Administrator is now indicated as primary.